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In this issue:
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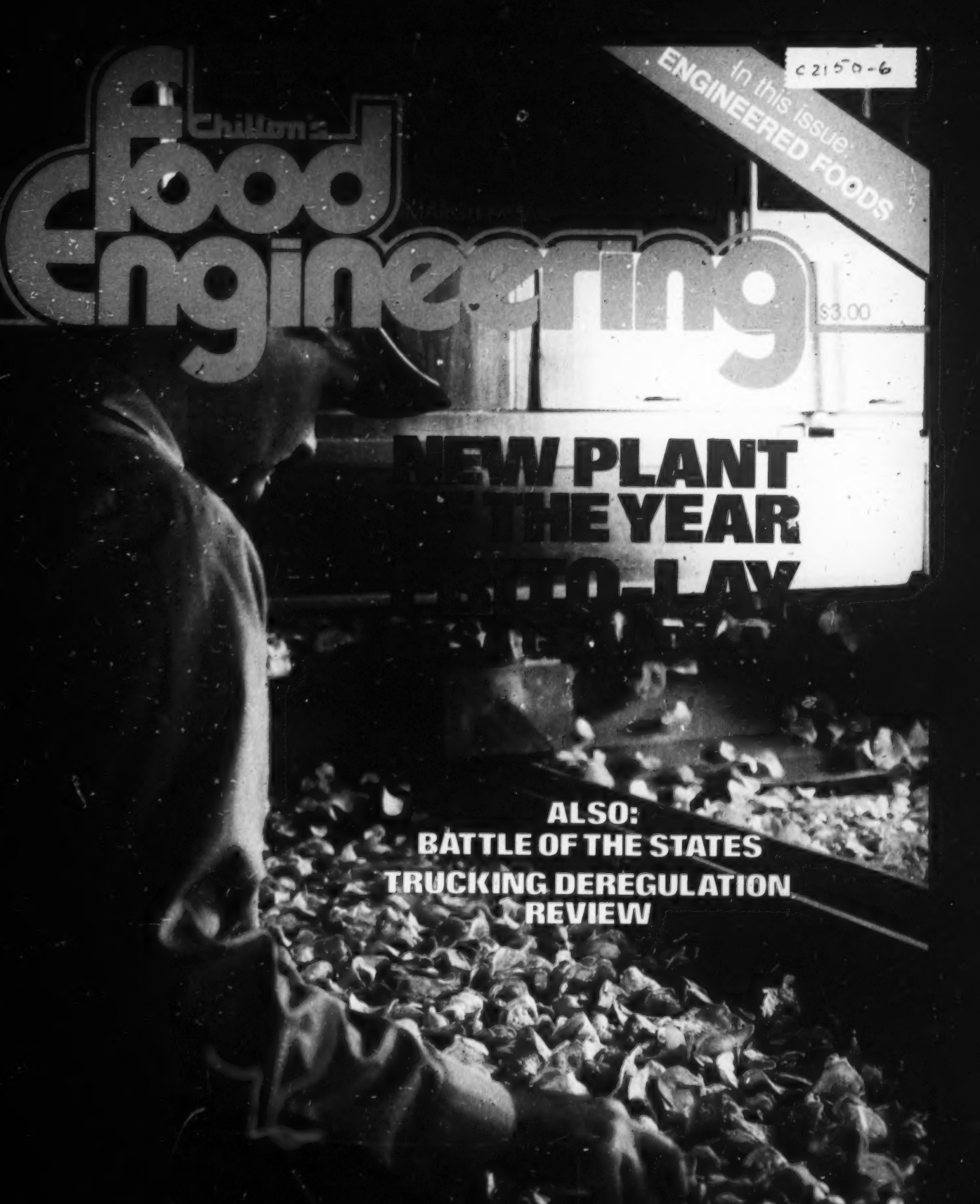

NEW PLANT
THE YEAR
TO-LAY

ALSO:
BATTLE OF THE STATES
TRUCKING DEREGULATION
REVIEW

Chilton's Food Engineering

ABOUT THE COVER

Each year Food Engineering selects the new plant we feel offers the most in plant design and engineering innovation. This year, the honor goes to Frito-Lay's Casa Grande, Arizona production facility.

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This natural product extends shelf life of bread and other baked goods without the use of other preservatives.

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Fruits such as papaya, guava and mangos not only have a unique and delicious taste, but are prized for their nutritional value.

70 Kids' Choice
A new white bread formulation could completely change the public's perception of white bread and its nutritional value.

74 Rice Flour
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76 Nutritious Snacks
Six-item line of snacks made from whole-grain corn and soybeans contain vitamins and minerals for a "nutritionally balanced" food.

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Special Emphasis

SANITATION & MAINTENANCE

Special focus is given to Sanitation & Maintenance equipment in this month's new product section.

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Will advertising remedy the ailing canned foods market?

The Canned Food Information Council proved the seriousness of its efforts to revitalize the canned foods market when it invested $1 million into television advertising time during Super Bowl XIX this January. But market figures and a new canned food forecast from the Department of Commerce show little hope that canned food consumption will even stay on an even keel, much less accelerate.

Food can production has been declining at an average rate of about 2 percent per year over the last five years, says the U.S. Department of Commerce *Industrial Outlook '84*, and the department predicts that the canned food market will decline about .5 to 1 percent over the next five years.

Not only will the task of stimulating the canned foods segment be a tough one, says one market analyst, but it will be impossible. "The market is maturing," he says. "And the trend is irreversible.

"The canned foods market has already experienced its biggest losses," he adds, "But the demand for canned foods will continue to drop somewhat over the next five years. Then consumption will begin to level off when we find out how much the market can hold."

DIANNE L. TAYLOR,
Associate Editor

The reason for the decline? More and more, consumers are buying what they perceive to be the freshest foods available—a trend one Commerce Department spokesman says is due to today's "behavioral psychology." According to the Food Marketing Institute, the majority of nationwide supermarkets have experienced an increase in fresh produce sales of nearly 2 percent since 1982. And the actual selling area devoted to produce, as well, has increased 2 percent since 1979, says FMI.

"Consumers no longer perceive canned foods as good," says the market analyst.

Efforts will continue

Supporters of the Canned Foods Information Council—which include over 100 corporations from the food, can manufacturing and iron/steel industries—are hoping this 'behavioral psychology' stumbling block can be overcome through marketing and advertising. "We have had quite a positive response from our ad," says Council Spokeswoman Julie O'Rorke. "It's a $16-billion industry."

The $1-million spent on the two 30-second Super Bowl spots is no small drop in the bucket, considering the council's budget for 1984 was only $2.5 million. Budget projections for 1985 are in the range of $4 to $5 million.

The commercial itself, which cost $155,000 to develop, stars a sexy female robot/android from the year 3,000 who

(Continued on next page)

Annual Growth Rate of Advertising Dollars By Industry

1985 Projections

Industry	SIC no.	Annual growth rate (%)
Food & Kindred Products	2000	4.9
Meat Products	2010	12.5
Dairy Products	2020	9.6
Canned-Preserved Fruits-Vegs	2030	8.6
Flour & Other Grain Mill Pds.	2041	8.7
Wet Corn Milling	2046	-10.4
Prepared Feeds for Animals	2048	8.6
Bakery Products	2050	-2.1
Cane Sugar Refining	2062	-.6
Beet Sugar	2063	-5.3
Candy & Other Confectionery	2065	7.6
Malt Beverages	2082	18.2
Distilled Rectif Blend Bevrg	2085	3.8
Bottled-Canned Soft Drinks	2086	6.9
Food Preparation NEC	2099	8.3

Source: Schonfeld & Associates, Inc., Evanston, Ill.

The food industry is expected to outspend all other industries in advertising dollars this year, according Schonfeld & Associates. The food industry's advertising expenditures are growing more rapidly than those of any other trade, says the firm.

The council's attempt to gain market share through an emphasis on advertising is not unusual in the food industry these days. Food industry advertising and sales promotion spending is expected to outpace advertising/sales promotion spending by all other industries—even the drug industry—according to Eugene Schonfeld. Schonfeld is head of Schonfeld & Associates, an Illinois-based firm which tracks nationwide advertising expenditures.

Food industry outlays will total $4.65 billion in 1985, he predicts, resulting in a 4.5 percent increase over 1984. Schonfeld arrived at his data through the analysis of financial statements of all publicly-owned food companies.

"It's important to note," concludes Schonfeld, "that some food firms finish far below the advertising average, while others finish far above the average."

Number of Food Cans Manufactured Annually

(in billions)

1978	30.3
1982	27.6
1983	27.0
1984	27.5*
1985	27.0*

**estimates*
Source: U.S. Dept. of Commerce

Though 1984 will be an exceptional year for food can manufacture due to a good overall harvest, there is no demand for canned foods, says the Commerce Department, and demand will decline over the next five years.

touts the convenience and nutrition of canned foods. She calls them 'items that astronauts might take on a trip to Jupiter in the year 3,000.'

The commercial is reportedly 'the first of its kind,' marking the first time that a character with truly fluid, human movement has been created by a computer. Since the Super Bowl, it has been aired on at least three additional television shows.

Twin-screw extrusion conference a success

A week of full-day seminars and processing demonstrations addressing the technical and economic aspects of twin-screw extrusion recently drew over 1,300 individuals. The conferences, sponsored by Werner & Pfleiderer, drew representatives from both large, small and medium-sized food firms.

Equipment! You'll see it all at Food & Dairy Expo '85

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Equipment! Ingredients! Packaging! Transportation! Distribution! Services!

More than 400 exhibits from every corner of the world will be assembled in the spacious Georgia World Congress Center in Atlanta. Join more than 15,000 corporate executives, plant managers and engineers, technical and research professionals, sales and marketing experts and purchasing and transportation managers who rely on Food & Dairy Expo for products and services to increase productivity and profits.

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Make your plans now to be there!

Register Now

Dairy & Food Industries Supply Association
6245 Executive Boulevard
Rockville, Maryland 20852
(301) 984-1444
Telex: 908706 - DFISA ROVE

President Reagan salutes food firms

As part of a new program to honor the private sector for outstanding contributions to society, President Reagan recognized six major food firms.

The president, as part of the President's Citation Program for Private Sector Initiatives, cited these companies:

- *Kraft, Inc.* for its sponsorship of the Annual 4-H Health Awards Program. Kraft and 4-H also produced a film on substance abuse and is actively involved in the Adopt-A-School Program.
- *Nabisco Brands* for the donation of over 14-million pounds of food to the needy through nationwide food banks.
- *General Mills, Inc.* for its development of alternative long-term care programs that allow the elderly in the Minneapolis-St. Paul area to remain at home and independent.
- *Beatrice*, also for the donation of food products to the needy—almost $2-million worth. Beatrice also has two annual recognition programs to encourage public service activities.
- *Anheuser-Busch, Inc.* for its outstanding support of the Summer Jobs for Youth Program and its community involvement in St. Louis.
- *Consolidated Foods* for donating $3.5-million in cash and $6.5-million in products to the needy this year and for its annual $100,000 leadership award to the non-profit organization with the most innovative program for the economically disadvantaged.

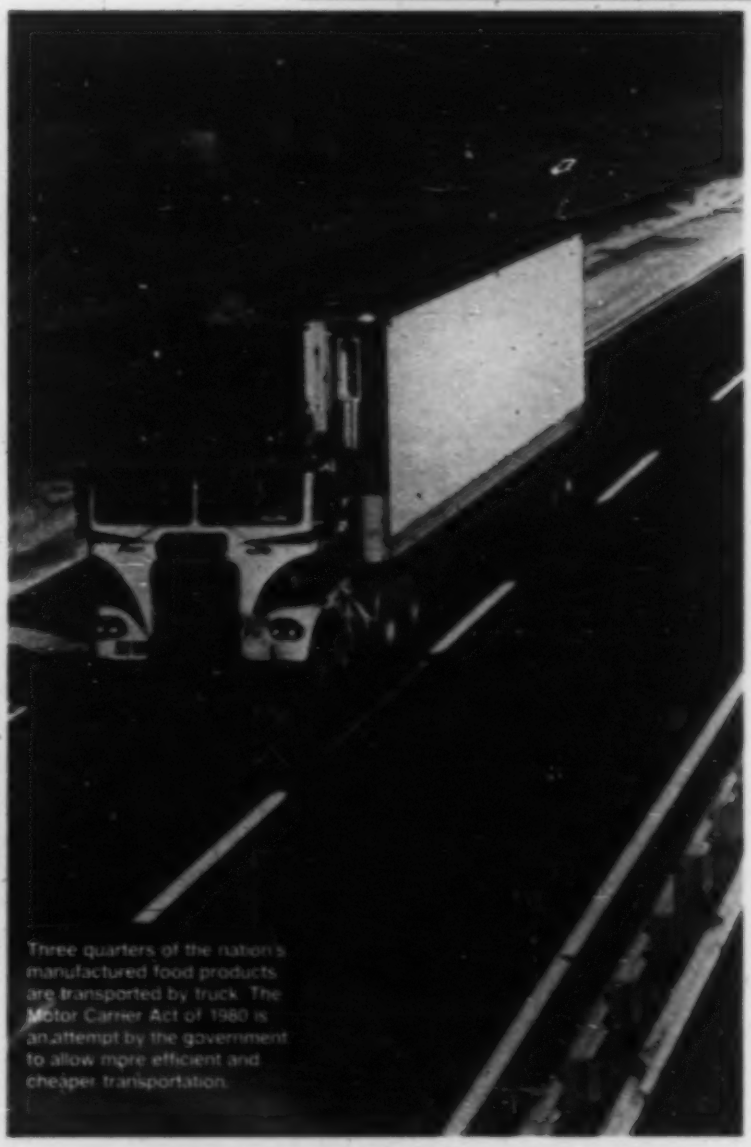
We haven't seen the end of postal hikes

Higher postal rates—beyond those that have just gone into effect—are already under discussion at the U.S. Postal Service. Some postal officials privately consider the new rates to be only "interim" steps, putting the new Postmaster General under pressure to raise rates further in the next year or two.

A special effort is cooking to boost third-class rates even sooner. Chairman of the Postal Service Board of Governors John R. McKean warns that his group does not believe third-class rates were raised enough this year (13.8 percent) and intends to "consider this matter closely and determine what additional steps we might take, outside the context of an omnibus rate proceeding," to kick up third-class charges.

DEREGULATION: IS IT WORKING?

Deregulation has apparently been good for private carriers and bad for unions. But is it good for the food industry? Congress is now reviewing the legislation.



Three quarters of the nation's manufactured food products are transported by truck. The Motor Carrier Act of 1980 is an attempt by the government to allow more efficient and cheaper transportation.

According to the most recent Census Commodity of Transportation Survey figures, over 313 million tons of manufactured food products are hauled by truck in the U.S. per year. Over two-thirds of this is hauled by private carriers. Because they are dealing with perishables that could require special handling, many food companies started their own private fleets. Towards the end of the '70's, rising fuel costs, insurance rates and maintenance costs forced private carriers to look for ways to become cost effective. Then came deregulation.

Because of the Motor Carrier Act of 1980, suddenly private carriers were allowed to offer an array of services. Fleets could now become "for hire" carriers. Food companies could set up transportation subsidiaries which could apply for their own authority. Private carriers could pick-up backhauls for other companies. They could also haul goods from one division of a company to another, (previously illegal). This increased the total available supply of carriers, and helped cut rates.

In the latest round of Senate subcommittee oversight hearings on the Motor Carrier Act, testimony was taken from several prominent industry figures, including representatives from transportation companies, unions, associations, securities analysts, and the Interstate Commerce Commission.

According to Charles R. Marcoux, President and Chief Operating Officer of Leaseway Transportation Corp. the Motor Carrier Act of 1980 has, without question, delivered the economic benefits to the U.S. economy that were promised. Transportation deregulation combined with improved information management have accelerated inventory velocity to unprecedented performance.

BILL DRENNAN
Senior Editor

Under regulation, the more efficient operators were constrained from expanding and the less efficient were protected by rate regulation and entry restrictions. Since 1979, a number of carriers who were not cost-competitive have been liquidated. Virtually all of these carriers were in poor condition prior to the Motor Carrier Act, says Marcoux. "Deregulation simply hastened their demise. Regulation was like a life-support system that slowly undermined the long-term vitality of our business."

Deregulation freed carriers to go where the freight was, not simply where their operating authority required them to go. Allowing private carriers, for example, to haul inter-corporately without compensation and to form transportation subsidiaries enabled them to significantly reduce their empty backhauls.

Marcoux indicates that total employment in truck driver and delivery driver occupations appears to be at near record levels, according to U.S. Census figures. Looking at the trucking industry alone — that is, not including private carriage and other trucking services provided by non-trucking — employment in 1983 was 4.7 percent below the 1980 level. This decline in employment in traditional trucking companies indicates that manufacturers, retailers and distributors are utilizing alternate methods of highway transportation. Teamster union members have borne the brunt of this transition. Most of the large carriers who have gone out of business employed teamster labor.

Another source of savings under deregulation, according to Marcoux has been the reduced profitability of the trucking industry. This dissipation of earnings cannot be entirely explained by deregulation. The recession and bad management also played a role.

Further action needed?

While most of the Motor Carrier Act of 1980 deals with the economic regulation of the trucking industry, Section 19 calls specific attention to the problem faced by the motor carrier industry as a result of state licensing, registration and filing requirements. Section 19 required the ICC and DOT to prepare a report to Congress on this subject.

The report specifically found that current requirements imposed on interstate carriers have evolved over the past 60 years from simple registration of vehicles to a complex structure. The additional burdens of registration, fuel taxes, privilege and use taxes, property taxes, third structure taxes (e.g. ton-mile, weight-distance and gross receipts taxes), ad valorem and sales taxes and fees for initiating tax accounts, purchasing decals and implementing safety programs still have a strangle-hold on our industry. Along with these multiple fees have come a myriad of administrative requirements. The burdens continue to multiply and no solution that strikes at the core of the problem has emerged.

The time has come, says Marcoux for Congress to make a serious high-level review of the way federal, state and local governments tax motor carriers operating in interstate commerce. Not only does this morass of tax structures pose an unreasonable burden on carriers, but we believe you will find that it costs almost as much to administer many of these taxes as the taxes collect.

According to James Voytko, Vice President, PaineWebber Inc., how any trucking company has fared thus far under the new, more freely competitive environment produced by the Motor Carrier Act of 1980 has been predominantly a function of two factors:

- How efficient (or cost-effective) they have been versus their competitors in producing trucking services; and,
- How successful they have been in meeting the specific service requirements of shippers at competitive rates.

The real issue, according to Voytko, is whether the trucking industry is offering a complement of services more closely tailored to the shippers' needs, and doing so in a more efficient manner. On this score, he feels that the Motor Carrier Act of 1980 has been a big success. Deregulation has prompted innovation and modernization. Since 1980 dozens of pricing plans have been introduced, all designed to enhance profitability, build market share, create dependable service and rate commitments, simplify rates or match rates more closely with actual costs. Rail/truck service links have increased dramatically, giving shippers a service not often available to them in the past.

One of the most prominent effects of the Act has been the gradual emergence of a new sense of economic realism in the dealings between labor and management. Wage levels must now reflect the prospects for the industry, *without* artificial help from the government.

The qualitative approach

1. The industry is consolidating. Efficient companies with good business niches, management and financing are benefiting at the expense of those, which for one reason or another, cannot hold onto the shipper's freight.

2. The customer's influence has grown. In the competition between trucking companies for the right to command a share of the industry's tonnage, revenue and profits, the shipper appears to have a vastly greater "say" since the passage of the Motor Carrier Act.

3. The industry is becoming more volatile

(Continued on next page)

"A troubling outgrowth of these deregulation business failures is the wrongful use of bankruptcy proceedings by unscrupulous managers to abrogate union contracts."

"Food companies can now set up their own transportation subsidiaries which can apply for their own authority. Backhauls for other companies have now become a profitable possibility."

because it is more competitive.

4. The general decline in for-hire trucking rates is giving some parts of the industry new life by making them competitive once again with some private fleets.

5. The union/non-union split in the industry is a constant source of competitive jostling.

6. Innovation has picked up within the industry in the form of new ventures allied with traditional trucking operations like piggyback forwarding, import/export services, rail/truck combinations, varied marketing and pricing strategies and new labor arrangements.

Private Fleet Tractor-Trailer Operating Data

	Annual Miles Per Tractor	Per Cent Empty Miles	Cost Per Mile Current $	Cost Per Mile Constant $
1981	100,300	22%	$1.25	$1.25
1982	91,100	24%	$1.26	$1.19
1983	97,000	21%	$1.29	$1.18

Fewer empty miles, and a lower real cost per mile are part of the results of the Motor Carrier Act of 1980, according to statistics on private fleets compiled by A.T. Kearney Management Consultants for the Private Truck Council of America. The cost per mile to operate a tractor-trailer in a private fleet has decreased in each of the past two years.

Backhaul Test Activity Comparison By Market

Market	% Pick-up Tonnage Prior to Test	% Pick-up Tonnage During Test
Los Angeles, CA	9%	72%
San Francisco, CA	12%	68%
Phoenix, AZ	0	47%
Buffalo, NY Syracuse, NY Albany, NY	2%	35%
Scranton, PA	49%	79%
Richmond, VA Norfolk, VA Roanoke, VA	0	38%
Baltimore, MD	0	32%
Kansas City, KS	59%	74%
Wichita, KS	0	65%
Springfield, MO	0	58%
OVERALL	10%	54%

Borden, Inc. introduced a Backhaul Program in test markets in March, 1982. A comparison of the percent of total tonnage backhauled prior to and during the test shows significant interest in the program. Over $200,000 was given back to customers in the form of backhaul allowances during this initial test period.

In contrast, Thomas J. Donohue, Executive Vice President and Chief Executive Officer, American Trucking Associations, Inc., does not believe that the Motor Carrier Act of 1980 has been completely beneficial. Says Donohue, "Because the first two years of deregulation were accompanied by two strong recessions, which alone could have affected the industry very negatively, it is too early to draw any sound conclusions. ATA opposes changes in the present collective ratemaking procedures. A decision on pending legislation to maintain or alter the system should be deferred until a more precise review of the effects of the Motor Carrier Act is completed."

"In addition," adds Donohue, "the implementation and enforcement of existing laws by the Interstate Commerce Commission has been inconsistent with the intent of Congress. The ICC has unilaterally gone further towards a deregulated trucking industry than Congress has directed."

While Donohue admits there were profitability gains in 1983, he claims the financial condition of the motor carrier industry in general continues to be weak. "Reasonable profits are critical if the regulated industry is to make long overdue investments in equipment and related capital expenditures."

Due to an inability to remain profitable, Donohue says that numerous carriers have gone out of business, filed for bankruptcy or severely curtailed operations. By 1982, the number of such carriers had reached some 350 established firms with $3.2 billion in revenues and 67,000 employees. This trend has continued throughout 1983 and 1984.

Also opposed to deregulation was Raymond J. Fularczyk, Secretary-Treasurer, International Brotherhood of Teamsters. According to Fularczyk, deregulators failed to anticipate the prolonged duration and painful intensity of restructuring traditional markets. In their haste to apply cost/benefit analyses and project huge savings for consumers, theorists refused to acknowledge the vunerability of the worker during deregulatory transition. Deregulation has exacted a tremendous price in human terms from Teamster members.

ICC policies of open entry and over-extended grants of operating authority have set in motion processes which have drastically altered the trucking industry, says Fularczyk. "The Commission has abandoned public need and fitness tests by approving nearly 95% of applications for new and extended authority."

Fularczyk points out that an unprecedented number of well-established carriers have gone bankrupt since implementation of the Motor Carrier Act of 1980. According to the American Trucking Association, 350 carriers have

(Continued on page 109)

failed since 1980.

"A troubling outgrowth of these deregulation business failures," says Fularczyk, "is the wrongful use of bankruptcy proceedings by unscrupulous managers to abrogate union contracts. It has become increasingly common for transportation firms to attempt to lower costs by pursuing exploitive labor policies. Heavy-handed threats to coerce give-backs in wages and fringe benefits from employees by threatening bankruptcy has become a stock weapon in management's arsenal against labor."

Fularczyk feels that the trucking industry has deteriorated. It resembles the chaotic environment of instability that existed prior to 1935. "This atmosphere of instability was the primary factor which led to the initial regulation of trucking in the United States. Knowledgeable economists are projecting a shakeout in the industry which will leave only the largest carriers in sound financial condition."

What Congress should do

Fularczyk lists several actions he feels Congress should take:

- Direct the ICC to implement the Act in accordance with Congressional intentions.
- Direct that displaced workers should have priority hiring rights when other regulated carriers expand.
- Direct that before grants of operating authority are tendered, the Commission must determine that carriers are capable of providing the service petitioned and that the service would satisfy some public need.
- Investigate the practice of "predatory pricing" and mandate that trucking rates must cover costs.
- Require not less than $1 million minimum level, of financial responsibility for non-hazardous cargo.
- ICC and USDA enforce the section of the Act that calls for "written contracts pertaining to certain interstate movements by motor vehicles". Owner operators should be considered employees for the purposes of labor law and be guaranteed the right off collective bargaining.

Problems with states

One point on which most of the witnesses agree, is that state regulations have become quite burdensome. Mr. Donohue states, "increased and new taxes by the states are creating artificial barriers to interstate commerce."

John G. Sarefield, of Borden Inc., Columbus, Ohio, testifying on behalf of The Private Truck Council of America, Inc., states that new options, available on the federal level, are not readily available on an intrastate basis due to intransigent economic regulation at the state level. Some 44 states still regulate entry into the trucking industry, and the vast majority of states have not been as liberal as the federal government in amending regulations and policies to make private fleets more productive.

"Differing economic regulations at the state and federal levels," says Sarefield, "means many private fleets are unable to use the federal options because some of their truck operations are intrastate in nature. The choice is either to separate one's fleet into interstate and intrastate sections (an expensive and impractical solution) or to comply with the most restrictive set of regulations applicable to one's fleet." □

Borden Backhaul Participation

(% of total through warehouse tonnage)

	(1981) Prior to Deregulation	1st Year Borden Program	2nd Year Borden Program
Eastern	9%	49%	53%
Central	17%	41%	38%
Southeast	27%	38%	42%
Southwest	14%	30%	34%
Western	18%	63%	64%

This chart shows the results of backhaul by Borden, Inc. for the first full year and year-to-date 1984, compared to the year prior to deregulation. There was a dramatic increase from 17% to 45% of Borden's total through warehouse tonnage being backhauled.

Employment In Specific Transportation Occupations

	1980	1981	1982	1983
				(In thousands)
Delivery & Route Workers	598	563	574	365*
Truck Drivers	1,878	1,878	1,841	2,195*
Total	2,476	2,441	2,451	2,560*
Percent Change Year to Year		-1.4%	+0.4%	+4.4*

**The Census Bureau revised its employment categories for 1983, making 1983 data less than perfectly comparable with earlier years.*

Source: "Handbook of Labor Statistics"

According to U.S. Census figures, total employment in truck driver and delivery driver occupations appears to be at or near record levels. Not including private carriage and other trucking services provided by non-trucking companies, employment was 4.7 percent below the 1980 level. Teamster union members have borne the brunt of this transition.

← Circle 107 or see FEM, p. 30